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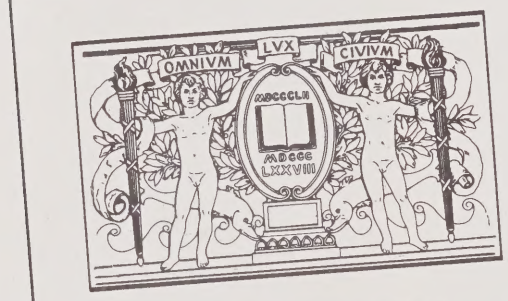

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Comparisons & Profiles

BOSTON
DALLAS
DENVER
SAN FRANCISCO

City of Boston · Raymond L. Flynn, *Mayor*
Boston Redevelopment Authority · Stephen Coyle, *Director*

September 1985

BOSTON - DALLAS - DENVER - SAN FRANCISCO; COMPARISONS AND PROFILES

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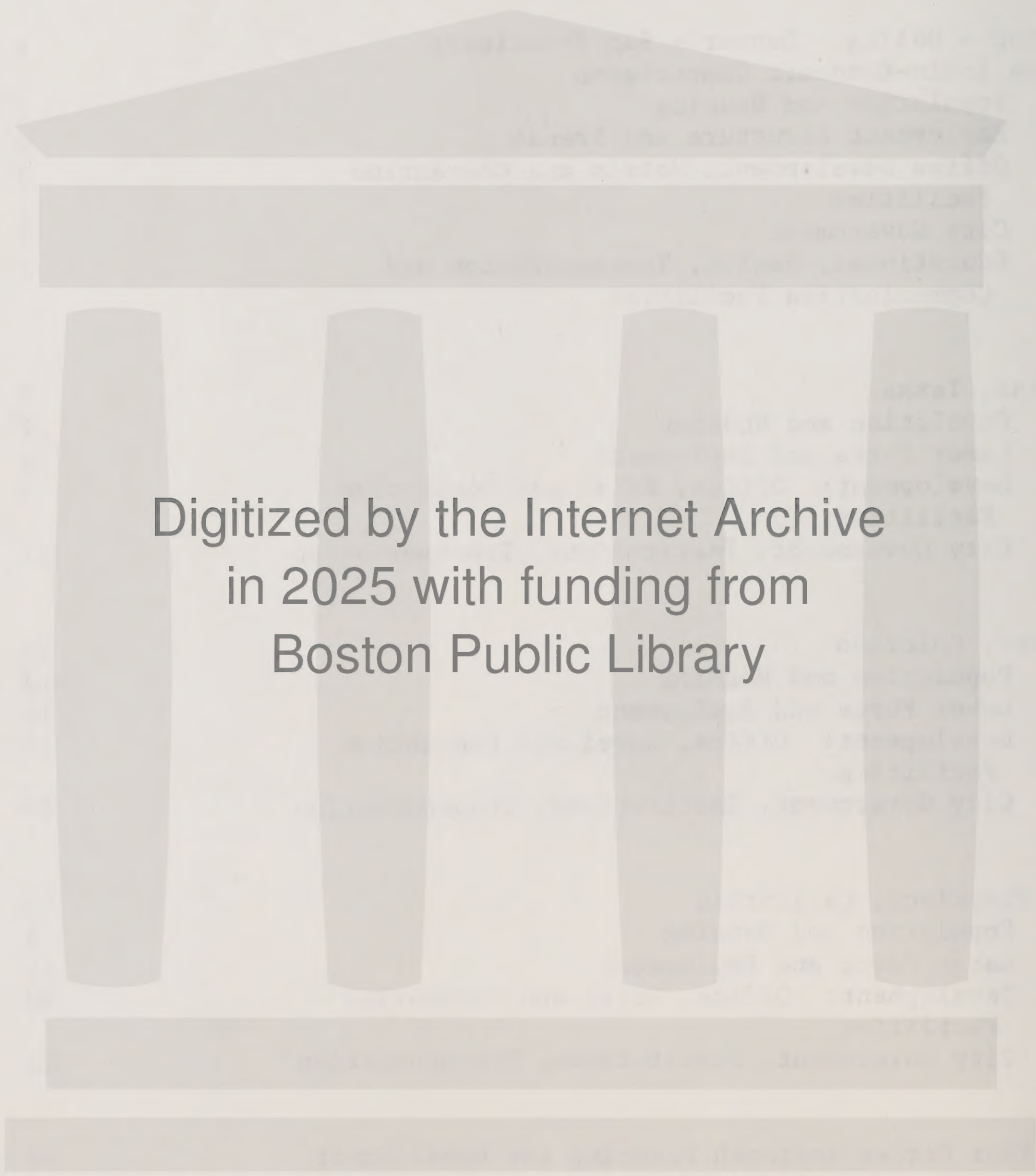
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SUMMARY: DALLAS-DENVER-SAN FRANCISCO COMPARISONS

Population and Housing

- The largest of the 4 cities in land area is Dallas. It's 4 times the size of Denver and 7 times the size of Boston and San Francisco, yet has the lowest population per square mile.

- Dallas has the largest black population (relative to population size); Denver has the largest population of persons of Hispanic origin; and San Francisco the largest population of Asian and Pacific Islanders.

- San Francisco's population is least "native," while Dallas has the highest proportion of "natives."

- Dallas has the most households, the highest proportion of family households and highest median income, whereas San Francisco has the greatest proportion of non-family households. Boston however has the lowest median household income and highest proportion of residents below the poverty level.

Employment Structure and Trends

- Unemployment rates (as of April 1985) for the 4 cities are well below the national average. Boston registered the lowest at 4.3%, followed by Dallas at 4.5%, Denver at 4.9% and San Francisco at 5.9%.

- In 1970 the Boston metro area economy topped the other three metro areas in total employment. Recessions of the 1970's, however, clobbered Boston economy's manufacturing sector. From 1970 to 1976, Boston metro area employment fell by 1% while Denver's grew by 30%, Dallas' by 21% and San Francisco's by 9%.

- From 1976 to 1985 Boston's employment growth outpaced San Francisco's and nearly kept up with Denver and Dallas in the latter 4 years.

- Boston has the largest ratio of jobs to residents (1.9 to 1) and the highest percentage of total jobs held by commuters (60%). San Francisco has lowest relative flows of commuters, 45% of total jobs, 14% of resident workers employed outside the city compared to 25% in Boston and Denver.

Office Development, Hotels and Convention Facilities

- Boston, Dallas, Denver and San Francisco ranked closely (8, 6, 9, and 5 respectively) among the 33 largest downtowns in terms of square feet of office construction 1950 - 1984.

- In the 1970s, Boston and San Francisco led with more than 12 million square feet each. During 1980 to 1984, however, Dallas and Denver shot ahead with 14.4 and 12.8 million square feet, respectively. Yet, construction in Boston and San Francisco for the four-year period was high.

- In terms of average annual absorption of downtown office space (1970-84), Boston, Dallas, Denver and San Francisco ranked closely, 6, 8, 7 and 4, respectively.

- In terms of current absorption (Spring of 1985), Dallas' and Denver's construction exceeded absorption by a large margin: each had a 4 years' supply of unleased office space, and vacancy rates of 15% in Dallas and 20% in Denver.

- Boston and San Francisco had a better demand and supply balance: 2.6 years of supply and 11% vacancy in Boston and 2.3 years of supply and 9% vacancy in San Francisco.

- In the Spring of 1985 Boston had the highest rental rates for Class A office space. In terms of average size of office buildings (height and square feet), Dallas has the largest buildings.

- In regard to hotel rooms, Dallas has the most (30,000), and Denver the least (12,500). Boston and San Francisco, however, have 5,000 rooms within walking distance of prime convention facilities.

- Hotel occupancy was highest in San Francisco (76% in 1984) and lowest in Denver and Dallas (64%). Boston at 70% was above average, but its average room rates ($76) were far above the others, closest was San Francisco at $61.

- While Dallas has the largest convention facilities, hosted the most events and delegates, San Francisco had more national convention and trade show events. In contrast, Boston and Denver while far behind in conventions ranked above half of the 33 largest convention cities.

City Government

- Boston and San Francisco city governments outspend Dallas and Denver by wide margins. Boston, however, is the only city which finances the school systems.

- In terms of tax revenue source, Boston is the most limited: Dallas receives 43% and San Francisco 30% of its tax revenue from levies on sales and gross receipts. In contrast, Boston raised almost 99% of its tax revenue from the property tax (1981).

- From 1975 to 1982, Boston reduced general expenditures by 33% and trimmed the number of city employees by one-fourth. Over the same period, Dallas increased expenditures by 17% and San Francisco's spending rose 10%. Denver's reductions, 11% of expenditures and 7% workers, were small compared to Boston.

Educational, Health, Transportation and Communication Facilities

- Boston's combination of education, health and transportation facilities are unmatched by Dallas, Denver or San Francisco.

- While San Francisco comes closest to Boston with its modern transit system, the city has fewer universities and hospital beds.

DALLAS

Population and Housing

- Dallas is the seventh largest city in the nation with a population of 974,234 (July 1984), representing a growth of over 70,000 persons, or 7.8% since March 1980. Dallas covers 330 square miles with a growing stock of predominantly single-family homes.

- Dallas has substantial black (29%) and Hispanic (12%) populations (1980), yet the city has a low poverty rate (14% of all persons) compared to Boston (20%). In 1980 median household income in Dallas ($19,703) topped Boston's figure by more than $3,000.

Economy

- Since 1970 the economy of the Dallas area has been experiencing substantial growth. Total employment increased an average of 5.7% per year 1970-1984, led by services and finance, insurance and real estate. Unemployment rates have been low.

Development: Office, Hotel and Convention

- Among the 33 largest downtowns in the nation, Dallas ranked third in office construction in the 1950s as 15 new buildings amounted to 4 million square feet of new space.

- In the 1960s and 1970s the construction of 13 large buildings added over 7 million square feet to the office stock.

- From 1980 to 1984, nineteen new buildings, seven of which were larger than 1 million square feet, amounted to 14.4 million square feet of office space.

- Among the twenty largest cities, Dallas ranked second in square feet of office construction per capita in 1984 (behind Boston) and second in office construction underway as of mid-1984 (behind New York).

- In Dallas absorption of downtown office space has not quite kept pace with absorption in Boston: Dallas has nearly 4 million square feet of unleased space and a 4-year supply, compared to a 2.6 year supply in Boston.

- The latest office market survey, Spring 1985, reported a 15.4% office vacancy rate in the metropolitan ring.

- In the hotel market in 1984, Dallas' occupancy rate (64% of hotel rooms) was below the national average (66%) and less than Boston's rate (70%).

- Dallas ranks high among the 26 largest convention cities in terms of national trade show and convention events; the city has 610,000 square feet of prime convention facility space.

City Government

- The city of Dallas has a council-manager form of government and 14,000 city employees (up 5% from 1975). Per capita property taxes are low, partly due to the role of city taxes on sales and gross receipts (43% of all city tax revenue).

DENVER

Population and Housing

- As of July 1984, Denver's population was 504,588, an increase of 12,000 or 2.5% over the March 1980 figure.
- Denver has a relatively small black population (12% of all persons), but nearly one out of every five Denver residents is of Spanish origin.
- Denver has a low poverty rate (14% of all persons) compared to Boston (20%), and the 1980 median household income of Denver ($15,506) was nearly $3,000 higher than Boston's median.
- Denver's housing stock is largely new (37% built since 1960) and oriented toward single-family homes and home ownership.

Labor Force and Employment

- The economy of the Denver area has grown at a faster pace than most areas, including Dallas. Unemployment has been low.
- Denver's key regional role in finance and production of energy sources contrasts with Boston's role as a regional high technology center. Commuting patterns in Denver resemble those in the Boston area.

Development: Office, Hotel and Convention

- In the 1970s Boston had twice as much office construction as Denver (1.25 million to 5.8 million square feet); the inverse occurred during 1980-84 as Denver added 12.8 million square feet to Boston's 6.2 million.
- During 1970-1984, Denver absorbed 85,000 square feet per year less than Boston. However, the lag in absorption translates into 4.1 years of supply of unleased office space and a downtown Denver vacancy rate of 20% in the Spring of 1985.
- In the hotel market in 1985, Denver's 12,500 hotel rooms averaged 64% occupancy, just below the national average, and somewhat less than Boston's 70% rate.

City Government, Institutions, Transportation

- The city of Denver has a Mayor-Council form of government and 11,400 city employees, down 7% from 1975 to 1982. Per capita property taxes are lower than those in Dallas, yet property taxes account for 65% of all tax revenue in Denver. Revenue from sales and gross receipts taxes make up 16% of all revenue.

SAN FRANCISCO

Population and Housing

- As of July 1984, San Francisco's population was 712,753, a growth of 34,000 or 5% since March 1980. This reversed a trend of decline for the city.

- San Francisco has more ethnic diversity than Boston: 22% of the population are Asian and Pacific Islanders, 13% black and 12% of Spanish origin.

- San Francisco's median household income ($15,866 exceeded Boston's median by over $3,000). Only 13.7% of all persons were below the poverty level, compared to 20% in Boston.

- Two-thirds of the households in San Francisco were renters, approaching Boston's 73% figure. Like Boston, San Francisco is dominated by old, multi-unit structures.

Labor Force and Equipment

- The economy of the San Francisco-Oakland metropolitan area has grown at a moderate pace with low unemployment rates. The steadiest growth has occurred in business and professional services.

- The San Francisco area, like the Boston area, has large service, trade and finance sectors.

- In San Francisco, commuters hold 45% of all jobs compared to 60% in Boston.

Development: Office, Hotel and Convention

- After a decade (1950-1959) of modest construction (6 buildings, 1 million square feet), office development burgeoned in the 1960s (22 buildings, 8.2 million square feet -- twice the amount in Boston), accelerated from 1970-1979 (23 buildings, 12.4 million square feet -- almost identical to construction in downtown Boston) and continued at an even faster pace from 1980-84 (34 buildings, 10.5 million square feet, compared to 6.2 million in Boston).

- San Francisco's office market absorbed 280,000 more square feet per year than Boston. The extensive absorption resulted in even less unleased space in San Francisco (2.3 years of supply) than in Boston (2.6 years). In Spring 1985, San Francisco's downtown office vacancy rate was 8.9% and rents were in the same range as those in Boston.

- In the hotel market in 1984, San Francisco's 24,000 hotel rooms averaged 76% occupancy, well above the national average (66%) and Boston's average (70%).

- In 1983 San Francisco had 50% more convention events and 63% more delegates than Boston.

City Government, Institutions, and Transportation

- The city of San Francisco has a Mayor-Council form of government and 21,000 city employees (1982), 4% fewer than in 1975. One-half of the city's general revenue comes from property taxes; 30% of all tax revenue comes from sales and gross receipts taxes.

HOW FOUR CITIES APPROACH PLANNING FOR DEVELOPMENT

Similarities

- All four cities are indeed preparing downtown plans.
- All four cities implicitly and explicitly encourage the "24-hour downtown concept" which includes office, retail, hotel, convention and housing.
- All four cities are attempting to control the pressure of commercial development upon housing.
- All four cities are specifically concerned with and planning for historic preservation.
- All four cities are preparing detailed transportation plans for the future.

Differences

- San Francisco and Boston are both preparing stronger public regulatory controls, while Dallas and Denver have less powerful planning instruments and more reliance on the private sector.
- Boston and San Francisco are preparing specific guidelines, whereas Dallas' and Denver's plans are more general and conceptual. Also, Dallas' and Denver's plans are more city-wide in scope rather than just for downtown.
- Boston's and San Francisco's plans are much more detailed concerning zoning, urban form and open space.
- Dallas is more particularly concerned with enhancing the business climate and with the effect of commercial development crowding out manufacturing.
- Boston's plan seems to have the most comprehensive community participation process through the development review.
- San Francisco's plan requires the Planning Department to prepare annual reports monitoring economic growth and policies' effectiveness to the Planning Commission, Mayor, and Board of Supervisors.
- Dallas plans to build new infrastructure for more capacity primarily because the city is so large and has emerging growth areas outside of downtown.
- Boston and Dallas seem to have more concern for the disparity of development between richer and poorer areas within the city.
- Denver has the strongest private sector leadership in plan preparation.
- While Denver and Dallas currently have the highest office vacancy rates, plans are less restrictive to development, whereas Boston and San Francisco are better "markets" but tend to be more stringent concerning future development.

Dallas

- During the 1980s Dallas has reorganized its planning and development agencies and has prepared several planning documents on the direction and scope of development activity in the city.

- Planning documents address four specific problems:

  - the constraints on the city's ability to service new development activity outside of downtown, particularly the northern sector;

  - the competition for development between the suburbs and the city;

  - the continued inbalance of economic growth between the city's prosperous northern and poorer southern halves; and

  - intrusion of commercial development into residential and industrial areas throughout the city.

- Traditionally, the private sector is much stronger and in control of development in Texas than is public sector planning.

Denver

- The Denver Partnership and the Planning Department are currently undertaking a joint venture to prepare a Downtown Plan to be completed by December 1985.

- A new city Department of Economic Development will be created to provide more comprehensive planning functions, specifically, plans for a new convention center, airport expansion, transit development, and smaller neighborhood commercial redevelopment.

- A range of planning policies and strategies are being prepared to guide future development: preservation, housing target areas, zoning review, and a new transportation access plan.

San Francisco

- The city of San Francisco has prepared probably the most comprehensive Downtown Plan and corresponding strict zoning regulations and design controls of any city in the nation.

- The plan builds upon successful attempts and learns from unsuccessful efforts for innovative zoning and comprehensive design guidelines in New York City over the last twenty years.

- There are also concerns for historic preservation, open space, stimulus of housing production, transportation strategies, and novel ideas for subsidizing transit projects, improvement, child care facilities, and art work provision for employees in downtown buildings.

- Although final approval for the "Implementing Actions" elements of the plan are not yet complete and both sides say the results do not go far enough in their particular direction, some rigorous form of the plan will be adopted.

1

Comparisons

BOSTON

DALLAS

DENVER

SAN FRANCISCO

BOSTON - DALLAS - DENVER - SAN FRANCISCO; SOME COMPARISONS

Though Boston, Dallas, Denver and San Francisco are quite different in demographic composition and economic structure, the four cities have had healthy economies and extensive office development in common in the 1980s.

Population and Housing

Dallas is by far the largest of the four cities in land area (see Table 1). At three times the size of Denver and seven times the size of Boston and San Francisco, Dallas has the lowest population per square mile.

Dallas also has the most residents and most households; Denver has the least. The largest black population (in percent of total population) is in Dallas, while Denver has the largest proportion of persons of Hispanic origin and San Francisco has the largest population of Asian and Pacific Islanders.

San Francisco's population is the oldest (median age) and the least "native" with less than four of every ten residents born in California. Dallas has the highest proportion of "natives," the most households, the highest proportion of family households, and the highest median household income. In contrast, San Francisco has the highest proportion of nonfamily households and Boston has the lowest median household income and the highest proportion of residents below the poverty level. (Boston's low ranking in income and poverty is due, in part, to its large student population; one out of six residents is a college student.)

In housing, Dallas has the largest, fastest growing, youngest housing stock (see Table 2). At the other extreme, Boston has the oldest housing stock with the highest proportion of renter-occupied units.

Employment Structure and Trends

As of April 1985, Boston, Dallas, Denver and San Francisco had unemployment rates well below the national average with the City of Boston registering the lowest at 4.3 percent. The respective metropolitan areas had unemployment rates under 5 percent, with the Boston area showing the lowest rate: 3.2 percent (see Table 3). Yet the four cities' paths to healthy economies differed notably.

The Boston metro area economy, encompassing the city as the core, topped the other three metro areas in total employment in 1970 (see Tables 4A and 4B). However, the recessions of the 1970s clobbered the Boston economy's manufacturing sector. Boston metro area employment fell one percent from 1970 to 1976, while the Denver area grew 30 percent, the Dallas area expanded by 21 percent and the San Francisco area grew 9 percent (see Tables 5A and 5B). From 1976 to 1980, a broad range of services led the Boston area to renewed growth in employment in all sectors. For that period and from 1980-1984, Boston's employment growth outpaced that of San Francisco, and nearly kept up with Denver and Dallas in the latter four years. Looking at the fourteen years together, Dallas and Denver expanded at about the same pace, well ahead of the older Boston and San Francisco areas.

By 1984, the compositions of the metropolitan economies looked quite distinct (see Tables 6A and 6B). Boston specializes in services

and high technology manufacturing, with stable and substantial trade and finance sectors. Dallas has relatively large manufacturing, trade, construction and finance sectors. Denver is oriented toward services, finance and construction and has a growing mining (energy-related industry. San Francisco relies most on services, trade, government and finance, and its transportation/public utilities sector is particularly large.

Of the four cities, Boston has the highest ratio of jobs to residents (1.9 to 1) and the highest percentage of total jobs held by commuters (60 percent). San Francisco has the lowest relative flows of commuters: 45 percent of total jobs; 14 percent of resident workers working outside of the city compared to 25 percent in Boston and Denver.

Office Development, Hotels and Convention Facilities

In spite of demographic and economic differences, Boston, Dallas, Denver and San Francisco ranked closely (8, 6, 9, 5, respectively) among the 33 largest downtowns in terms of millions of square feet of office construction 1950-1984 (see Table 7). Office construction in each of the four cities accelerated to a record pace during 1980 to 1984. Whereas Boston and San Francisco led the four with more than 12 million square feet of space, each, in the 1970s, Dallas and Denver shot ahead with 14.4 and 12.8 million square feet, respectively, during 1980 to 1984. Yet, construction in Boston (6.2 million square feet) and San Francisco (10.5 million) for the four-year period was high by any previous standards.

By another measure, mid-1984 office construction underway per capita, Boston ranked first among the 20 largest cities (see Table 8), and Dallas and San Francisco ranked second and third.

Boston, Dallas, Denver and San Francisco ranked closely (6, 8, 7, 4, respectively) in terms of average annual absorption of downtown office space, 1970-84 (see Table 9). However, current absorption is a sensitive factor in each local office market. As of the Spring of 1985, Dallas and Denver's construction exceeded absorption by a large margin. Dallas and Denver each had a four years' supply of unleased office space, and vacancy rates hit 15 percent in Dallas and 20 percent in Denver. Demand and supply were in better balance in Boston (2.6 years of supply and 11 percent vacancy) and San Francisco (2.3 years of supply and 9 percent vacancy).

Boston had the highest rental rates for Class A office space in the Spring of 1985, but the other three cities are closing the gap on rents on buildings under construction.

Dallas has the largest office buildings in terms of average size in square feet and height: the tallest building in the four cities is Dallas' Main Centre at 939 feet, compared to the 853-foot Transamerica Pyramid in San Francisco, the 790-foot John Hancock Tower and the 714-foot Republic Plaza in Denver (see Table 10). Dallas and San Francisco have 15 buildings over 500 feet tall, compared to 12 in Boston.

Regarding hotel rooms, Dallas has the most (30,000) and Denver the least (12,500). (See Table 11.) However, Boston and San Francisco each have 5,000 rooms within walking distance of prime convention facilities. San Francisco has the highest average occupancy (76 percent in 1984) and

Denver and Dallas the lowest (64 percent). (See Table 12.) Boston's 70 percent occupancy was above average, but its average room rates ($76) were far above the other three cities (San Francisco next at $61).

Dallas has the largest convention facilities, hosted the most events and the most delegates (see Table 13). Only New York and Chicago had more delegates than Dallas in 1983. San Francisco had more national convention and trade show events than Dallas, but Dallas' much larger facilities handled several thousand more delegates. Boston and Denver were far behind in the convention business, yet the two rank above half of the 33 largest convention cities.

City Government

City governments in Boston and San Francisco outspend their counterparts in Dallas and Denver by wide margins (see Table 14). However, Boston is the only city of the four that must finance a school system. At the same time, Dallas spends a minimal share of its budget on health and hospitals.

Boston is the most limited in terms of tax revenue source. Dallas receives 43 percent of its tax revenue from levies on sales and gross receipts; San Francisco receives 30 percent from the same source. In contrast, Boston had raised almost 99 percent of its tax revenue (1981) from the property tax. With the enactment of tax limitation legislation (Proposition 2½, in 1980), and new tax measures legislated (in 1985), the property tax share of tax revenue in Boston will decline to an estimated 92 percent for FY1986.

From 1975 to 1982, Boston reduced general expenditures (in constant dollars) 33 percent and trimmed the number of city employees by

one-fourth (Table 14). Over the same period, Dallas increased expenditures 17 percent and San Francisco's spending rose 10 percent. Denver's reductions (11 percent of expenditures, 7 percent of workers) were small compared to those in Boston.

Educational, Health, Transportation and Communication Facilities

In Boston, where higher education and health and medical services are export activities, the combination of institutions of education and health and transportation facilities are unmatched by Dallas, Denver or San Francisco. San Francisco comes closest with its modern transit system, but the city has many fewer universities and hospital beds than Boston.

2

Profile

DALLAS

DALLAS, TEXAS

Population and Housing

Dallas is the second largest city in Texas, behind Houston, and the seventh largest city in the nation. Dallas' population as of July, 1984 was 974,234, representing a growth of over 70,000 persons, or 7.8 percent, since March, 1980. This followed 7 percent growth from 1970-1980, a 24 percent increase from 1960-1970 and a 56 percent jump from 1950-1960. In fact, in 1950, Boston had almost twice as many residents as Dallas. As of July 1984, the Texas city had 70 percent more people than Boston.

In contrast with Boston's compact geography and dense settlement, Dallas is a sprawling city covering 330 square miles. Nearly seven Bostons would fit within the boundaries of this much less densely populated Texas city.

Dallas has substantial black (29 percent) and Hispanic (12 percent) populations (1980), yet the city has a low poverty rate (14 percent of all persons) compared to Boston (20 percent). Median household income in Dallas ($19,703) in 1980 topped Boston's figure by more than $3,000.

Dallas residents have a median age (28.7 years) that is almost identical with Boston's median, but Dallas has a greater proportion of persons below 18 years of age. Although Dallas has experienced inmigration, two-thirds of the city's residents were born in Texas.

Educational attainment was comparable in Dallas and Boston. Unlike Boston and San Francisco, where almost three out of every ten elementary and high school students are in private schools, private enrollment in Dallas was only 12 percent in 1980.

Among the four cities in these profiles, Dallas stands out with relatively large households supported by a high proportion of family households. Whereas Boston is dominated by multi-unit, rental housing, more than one-half of Dallas' households live in single-family homes, and almost one-half of all housing units are owner-occupied. Dallas' growing housing stock (up 29 percent 1970-1980) apparently kept ahead of demand, as the vacancy rate was 9 percent in 1980. In sharp contrast with Boston, Dallas' housing stock is new: 55 percent of all units were constructed after 1959 and only ten percent were built prior to 1940; six out of every ten units in Boston were constructed before 1940.

Labor Force and Employment

The Dallas area has enjoyed relatively low unemployment rates in the 1980s. In April 1985, Dallas had a labor force of 596,000, 4.5 percent of whom were unemployed. The Dallas metropolitan area had a 3.9 percent unemployment rate in April 1985, compared to 3.8 percent in April 1984.

Commuting from the suburbs to the city of Dallas is not as extensive as it is in Boston and Denver. Commuters accounted for 44 percent of total employment in Dallas in 1980, and 82 percent of the city's residents worked in the city. This reflects the large land area of Dallas that encompasses a large share of the metropolitan area's workplaces.

The economy of the Dallas area has been experiencing substantial growth since 1970. Total employment increased an average of 5.7 percent per year 1970-1984, or 80 percent over the period. The national recessions in 1974-75, 1980 and 1982 barely retarded the economic

expansion of the area. The Dallas metro area economy specializes in wholesale and retail trade (27 percent of total employment), services (22 percent) and manufacturing (20 percent). In comparison to Boston, Dallas has more trade, less services employment, and more construction employment. Services and finance, insurance and real estate have led the employment growth since 1970. The construction sector has been especially strong since 1976.

Development: Office, Hotel and Convention

Downtown Dallas has experienced extensive office development in the last four decades. Among the 33 largest downtowns in the nation, Dallas ranked third in office construction in the 1950s as 15 new buildings amounted to 4 million square feet of new space. During that period, rapid population and employment growth along with a construction boom established Dallas as a major downtown.

In the 1960s and 1970s, office markets heated up in older downtowns such as Boston and San Francisco. Concurrently, Dallas had a lower ranking in each of the decades (9th and 11th, respectively), but the construction of 13 large buildings added over 7 million square feet to the office stock from 1960-1979.

Dallas ranked fourth in construction in a nationwide expansion of office space 1980-1984. Nineteen new buildings, seven of which were larger than 1 million square feet, amount to 14.4 million square feet of office space.

For the years from 1950-1984 combined, Dallas ranked sixth among the 33 largest downtowns with 25.7 million square feet, just ahead of Los Angeles and Boston. Dallas also ranks fourth, just ahead of Boston,

in average size of downtown office buildings constructed from 1950-1984. Among the twenty largest cities, Dallas ranked second in square feet of office construction per capita in 1984 (behind Boston) and second in office construction underway as of mid-1984 (behind New York).

Absorption of downtown office space in Dallas has not quite kept pace with absorption in Boston. Dallas, with 993,000 square feet per year 1970-1984, ranked eighth among the 33 largest downtowns; Boston's 1,084,000 annual rate was good for sixth place. The slight lag in absorption is reflected in Dallas' nearly 4 million square feet of unleased space and a 4-year supply, compared to a 2.6-year supply in Boston.

The latest office market survey, Spring 1985, reported a 15.4 percent office vacancy rate in Downtown Dallas, and a 20.1 percent vacancy rate in the metropolitan ring. In comparison, Boston's rate was 11.2 percent in the Downtown and 7.3 percent in the metro ring. Rental rates for Class A space were substantially lower in Downtown Dallas ($20.84 average) than in Downtown Boston ($33.83 average). However, buildings under construction in Dallas have average rental rates at $30.00, approaching Boston's $36.16 average.

Dallas has the third tallest building outside of Manhattan: Main Centre, 939 feet, 73 stories. Fifteen other buildings in Dallas tower over 500 feet.

In the hotel market in 1984, Dallas improved its hotel occupancy by 7.6 percent from 1983. Yet, the 1984 occupancy rate (64 percent of hotel rooms) was below the national average (66%) and less than Boston's rate (70%). Hotel room rates in Dallas jumped 11 percent 1983-1984, but

the average rate ($52.19) was still less than the national average ($56.22) and well below Boston's average ($75.91).

Dallas has 30,000 hotel rooms, ranking sixth among the 26 largest convention cities (Boston has 16,200). However, only 1,030 of Dallas' hotel rooms are within walking distance of the Downtown convention sites, compared to 5,000 in Boston.

Dallas ranks high among the 26 largest convention cities in terms of national trade show and convention events (6th), delegates (4th) and total (international, regional, state) events (4th) and delegates (3rd). Some of the convention site factors for Dallas include 3.1 million people in the standard metropolitan statistical area, 610,000 square feet of prime convention facility space (compared to 150,000 sq. ft. in Boston), and direct national airline flights to 114 cities (ranking 8th, just ahead of Boston).

City Government, Institutions, Transportation

The City of Dallas has a council-manager form of government and 14,000 city employees (up 5 percent from 1975). Per capita property taxes are low, partly due to the role of city taxes on sales and gross receipts (43 percent of all city tax revenue). Dallas receives relatively small amounts of intergovernmental revenue, (62 million in 1981), only 12 percent of which comes from the State of Texas. Per capita expenditures by the City of Dallas were just over one-half of those of Boston in 1981, largely due to the independent public school district that serves Dallas residents. Dallas spent only $7 million on health and hospitals in 1981.

Dallas, like Boston, Denver and San Francisco, is a regional center for the federal government; 16,000 federal civilian government employees worked in Dallas in 1980.

Dallas has 30 hospitals, but only 6,800 beds, compared to 9,400 in Boston (1980). On the basis of beds per 100,000 residents, Boston has twice the hospital capacity of Dallas.

The City of Dallas has 33 universities and colleges and a major public library system. Communications facilities include 26 television stations and 37 radio stations.

Dallas has 2 major airports, 8 railroads, 2 transcontinental bus lines and a major transit system. However, only 8 percent of the resident workers take public transportation to work, compared to 34 percent in Boston.

3

Profile

DENVER

DENVER, COLORADO

Population and Housing

Denver is the 24th largest city in the United States. As of July, 1984, Denver's population was 504,588, an increase of 12,000, or 2.5 percent over the March, 1980 figure. This followed a 4 percent decrease from 1970-80, a 4 percent increase from 1960-1970 and a 19 percent rise in the 1950s.

Geographically, Denver covers more than twice the area of Boston. Consequently, it had only 4,500 persons per square mile in 1980, compared to 12,000 in Boston.

Denver has a relatively small black population (12 percent of all persons), but nearly one of every five Denver residents is of Spanish origin. Denver has a low poverty rate (14 percent of all persons) compared to Boston (20 percent), and the 1980 median household income in Denver ($15,506) was nearly $3,000 higher than Boston's median.

The median age of Denver residents (30.3 years) was slightly higher than the Boston figure, and the age distribution was similar. Extensive inmigration is evident from the fact that 58 percent of Denver's residents were born outside of Colorado. Boston is the inverse, with 58 percent of its residents born in the Bay State.

Educational attainment was somewhat higher in Denver than in Boston among residents 25 years and over. And unlike Boston, where three of every ten elementary and high school students opted for private schooling, private enrollment in Denver was only 16 percent in 1980.

Denver's households are smaller on average (2.27 persons) than those in Boston (2.40), and nonfamily households are nearly as prevalent

in Denver as in Boston. In contrast to Boston, Denver's housing stock is largely new (37 percent built since 1960) and oriented toward single-family homes and home ownership. In fact, single-unit houses accounted for 54 percent of all units in Denver (compared to 16 percent in Boston) while two-, three- and four-unit structures comprised only 9 percent of the housing stock (compared to 42 percent in Boston). One-half of all housing units are occupied by owners. Growth in Denver's housing stock, 18 percent from 1970 to 1980, more than kept pace with demand as reflected in the 7.1 percent vacancy rate in 1980.

Labor Force and Employment

The Denver area has experienced low unemployment rates in the 1980s. In April 1985, the City of Denver had a labor force of 296,000 and a 4.9 percent unemployment rate, which was slightly higher than the City of Boston's rate (4.3 percent). The Denver metropolitan area had a 4.8 percent unemployment rate in April 1985, the same as the previous April.

Commuting patterns in Denver resemble those in the Boston area. Suburban commuters hold 54 percent of all jobs located in the City of Denver, compared to 60 percent in Boston. Reverse commuting is of the same magnitude in both cities: 25 percent of working residents work outside of the city.

The economy of the Denver area has grown at a faster pace than most areas, including Dallas. Total employment in the Denver area increased an average of 6.1 percent per year 1970-1984, or 85 percent over the period. This growth was unabated by national recessions in the 1970s and early 1980s. The Denver and Boston areas, are similar in their

orientations toward services, trade, and finance. Like the Boston area, the Denver areas's government, trade and manufacturing sectors have held constant or slightly declining shares of total employment since 1970. Growth in the Denver area has been most rapid in the services, finance and mining sectors. Concerning the latter, Denver's key regional role in finance and production of energy sources contrasts with Boston's role as a regional high technology center.

Development: Office, Hotel and Convention

Extensive office construction in Downtown Denver in the 1970s was followed by even greater activity in the early 1980s. From 1950 to 1969, office construction in Denver amounted to 2.3 million square feet, compared to 4.3 million in Boston. Whereas Boston had twice as much construction as Denver in the 1970s (12.3 million to 5.8 million square feet), the inverse occurred during 1980-84 as Denver added 12.8 million square feet to Boston's 6.2 million.

Denver ranks 7th among the 33 largest downtowns in terms of average annual absorption of office space, 1970-1984. Denver absorbed 85,000 square feet per year less than Boston, the 6th ranking city. However, the lag in absorption translates into 4.1 years of supply of unleased office space, 50 percent more unleased space than Boston, and a downtown Denver vacancy rate of 20 percent in the Spring of 1985 (almost twice Boston's rate). Yet, all is not bleak in the downtown Denver market. Two-thirds of downtown office construction were preleased (Spring 1985) and rental rates for Class A space are relatively low at $22.00 in existing buildings and $29.00 in buildings under construction. The

metro ring has a comparable vacancy rate and rents are a few dollars less than downtown rents.

Among the 33 largest downtowns, Denver ranked 9th in office construction from 1950-1984, just behind Boston. Denver ranked 5th in number of buildings constructed (62) yet buildings tended to be small relative to other downtowns: the average size over the period was 339,000 square feet and only three buildings were larger than 1 million square feet.

In terms of height, only six of Denver's buildings are over 500 feet, the tallest being Republic Plaza at 714 feet, 56 stories.

In the hotel market in 1985, Denver's 12,500 hotel rooms averaged 64 percent occupancy, just below the national average, but somewhat less than Boston's 70 percent rate. The average room rate in Denver is $53.26, well below Boston's average rate ($75.91 in 1984).

Denver ranks fairly high among the 26 largest convention cities in terms of national convention and trade show events (10th) and total delegates (14th). While Denver's largest single hall is only two-thirds as large as the Hynes Auditorium, Denver has twice the meeting space in its prime facility and had more convention events than Boston. In terms of other convention factors, Denver has a relatively small metropolitan area population (1.7 million), but it ranks 6th in number of direct national airline flights.

City Government, Institutions, Transportation

The City of Denver has a Mayor-Council form of government and 11,400 city employees, down 7 percent from 1975 to 1982. Per capita property taxes are lower than those in Dallas, yet property taxes

account for 65 percent of all tax revenue in Denver. Revenue from sales and gross receipts taxes make up 16 percent of all revenue. Like Boston, Denver receives more than one-third of its revenue from intergovernmental aid (55 percent of which is state aid), but the absolute level of that aid is less than one-half of Boston's intergovernmental revenue.

General expenditures per capita for the City of Denver were less than 70 percent of Boston's level, largely due to Denver's independently-financed public school system. For example, the two cities spent the same amount per capita ($160) on health and hospitals, while Boston spent somewhat more per capita for police protection ($125 to Denver's $90). Over the period 1975-1982, Denver's total expenditures in constant dollars decreased 11 percent, compared to a 33 percent reduction in Boston.

Denver is a regional center for the federal government; 12,000 federal civilian government employees worked there in 1980.

Denver had 21 hospitals in 1980, with 5,900 beds. On the basis of beds per 100,000 residents, Denver had almost 40 percent less hospital capacity than Boston, where health care is an export activity..

The City of Denver has 2 universities and 3 colleges. Communications facilities include 7 television stations and 35 radio stations.

Denver has an international airport, 5 major rail freight lines, Amtrak, 2 bus lines, and 3 interstate highways intersecting the city. Only 10 percent of the resident workers take public transportation to work, compared to 34 percent in Boston.

4

Profile

SAN FRANCISCO

SAN FRANCISCO, CALIFORNIA

Population and Housing

San Francisco is the thirteenth largest city in the nation. San Francisco's population as of July, 1984 was 712,753, a growth of 34,000, or 5 percent since March 1980. This reversed a trend of decline for the city: population changed -5 percent from 1970 to 1980, -3 percent from 1960-1970 and -5 percent during the 1950s. In 1950, Boston had 25,000 more residents than San Francisco. However, Boston's population dipped in the next three decades to the point where San Francisco now has 142,000 more residents than Boston.

San Francisco and Boston share many characteristics but several distinctions are evident in demographic figures. The two cities are nearly identical in size and both are densely settled, though San Francisco has a somewhat higher density. San Francisco has more ethnic diversity: 22 percent of the population are Asian and Pacific Islanders, 13 percent black and 12 percent of Spanish origin. Although the city did not experience net inmigration for decades, only 37 percent of all residents were born in California. In contrast, 58 percent of Boston residents were born in Massachusetts.

The median age of San Francisco residents is high: 34.1 years compared to 28.9 in Boston. Only 17 percent of San Francisco residents are under 18, whereas Boston has 22 percent and Dallas has 27 percent in that age range. The higher age coincides with small average household size (2.19 persons per household) and a predominance of nonfamily households (53 percent of all households).

San Francisco's median household income ($15,866) exceeded Boston's median by over $3,000. Only 13.7 percent of all persons were below the poverty level, compared to 20 percent in Boston.

Two-thirds of the households in San Francisco were renters, approaching Boston's 73 percent figure. San Francisco and Boston have the same proportion of large, multi-unit structures (5 or more units), but San Francisco has more single-family homes and fewer of the two-, three-, and four-unit structures. San Francisco's housing stock is nearly as old as Boston's: more than one-half of the San Francisco housing units were built prior to 1940.

Educational attainment is relatively high among San Francisco adults. Much like Boston, three of every ten elementary and high school students are in private schools.

Labor Force and Employment

The San Francisco area has enjoyed relatively low unemployment rates in the 1980s. In April 1985, the City of San Francisco had a labor force of 394,000 and a 5.6 unemployment rate, which was somewhat above the City of Boston's rate (4.3 percent). The San Francisco metropolitan area had a 4.6 percent unemployment rate, down from 5.3 percent in April 1984.

Flows of commuters into and out of the City of San Francisco are less than those in Boston. Commuters hold 45 percent of all jobs in San Francisco, compared to 60 percent in Boston. Reverse commuting amounts to only 14 percent of working residents, compared to 25 percent in Boston.

The economy of the San Francisco-Oakland metropolitan area has grown at a moderate pace compared to Dallas and Denver. In fact, from 1976-1984, employment in the Boston metropolitan area has expanded faster (28 percent) than employment in the San Francisco-Oakland area (20 percent). All sectors grew in the 1976-1980 period in the Bay area, but from 1980 to 1984, construction and manufacturing employment dropped by 6 percent each, transportation and public utilities stayed about the same, and government employment fell by 6,000. The steadiest growth has occurred in business and professional services.

The San Francisco area, like the Boston area, has large service, trade and finance sectors. Though the San Francisco-Oakland metro area manufacturing base is small (12 percent of the area's employment base), in comparison with the 20 percent share of the Boston area economy, San Jose and the Silicon Valley are nearby. Concurrently, finance, insurance and real estate accounted for nearly 10 percent of all employment in 1984, compared to 7.5 percent in Boston. The transportation/public utilities/communications (8 percent of total employment) and government (17 percent of total) sectors in the San Francisco area are also large relative to those sectors in the Boston area.

Development: Office, Hotel and Convention

Office development trends in Downtown San Francisco have been similar to those in Downtown Boston. After a decade of modest

construction (6 buildings, 1 million square feet, 1950-1959), office development burgeoned in the 1960s (22 buildings, 8.2 million square feet--twice the amount in Boston), accelerated from 1970-1979 (23 buildings, 12.4 million square feet--almost identical to construction in Downtown Boston) and continued at an even faster pace from 1980-1984 (34 buildings, 10.5 million square feet, compared to 6.2 million in Boston).

San Francisco ranks fourth among the 33 largest downtowns in terms of average annual absorption of office space 1970-1984. San Francisco's office market absorbed 280,000 more square feet per year than Boston. The extensive absorption resulted in even less unleased space in San Francisco (2.3 years of supply) than in Boston (2.6 years). In Spring 1985, San Francisco's downtown office vacancy rate was 8.9 percent and rents were in the same range as those in Boston. The vacancy rate in San Francisco may increase this year, as only 10 percent of downtown office constructed was preleased as of April.

Among the 33 largest downtowns, San Francisco ranked fifth in office construction 1950-1984, behind New York, Chicago, Washington, D.C. and Houston. San Francisco ranked fourth in number of buildings constructed yet the size of the buildings (377,000 square feet) was about average for the 33 downtowns. San Francisco has 6 buildings with over 1 million square feet, compared to 9 buildings in Boston.

Regarding height, only 4 buildings are taller than 600 feet. The tallest building is the Transamerica Pyramid at 853 feet, 48 stories.

In the hotel market in 1984, San Francisco's 24,000 hotel rooms averaged 76 percent occupancy, well above the national average (66 percent) and Boston's average (70 percent). The occupancy rates in 1983 were similar. The average room rate in San Francisco in 1984 was

$61.11, above the national average ($56.22), but below Boston's average rate ($75.91).

San Francisco ranks high among the 26 largest convention cities in terms of national convention and trade show events (fourth) and total delegates (sixth). Interestingly, although San Francisco has 80 percent more exhibit space in its prime facility and more meeting space than Boston, the two cities have similar site factors in terms of hotel rooms within walking distance of convention facilities (5,000), metropolitan area population (around 3.5 million) and number of direct national airline flights (101). However, in 1983 San Francisco had 50 percent more convention events and 63 percent more delegates than Boston.

City Government, Institutions, Transportation

The City of San Francisco has a Mayor-Council form of government and 21,000 city employees (1982), 4 percent fewer than in 1975. One-half of the city's general revenue comes from property taxes; 30 percent of all tax revenue comes from sales and gross receipts taxes. Like Boston, San Francisco receives more than one-third of its revenue from intergovernmental aid, two-thirds of which comes from the state of California.

General expenditures per capita in 1981 were nearly the same in San Francisco and Boston. While Boston's expenditures were cut by 33 percent in constant dollars from 1975 to 1982, San Francisco increased its expenditures 10 percent over the same period. Whereas Boston spent 31 percent of its budget on education, San Francisco (with a fiscally independent school system) spent relatively more on health and hospitals and sanitation and sewerage.

San Francisco is a regional center for the federal government: 24,000 federal civilian government employees worked there in 1980.

Boston is more of an exporter of health and educational services. For example, San Francisco had 20 hospitals (including a major medical center) in 1980, with 6,400 beds. On the basis of beds per 100,000 residents, San Francisco had only 56 percent of the hospital capacity of Boston. Further, San Francisco has only four universities and colleges compared to 16 in Boston. Other educational and communication facilities in San Francisco include a major public library system, 7 television stations and 45 radio stations.

San Francisco has a major airport, an intra-city railway system, 2 railway transit systems, bus and railroad service, a ferry system, and 1 underwater tunnel. Nearly 40 percent of all resident workers take public transportation to work, compared to 34 percent in Boston.

5

Planning Approaches

BOSTON

DALLAS

DENVER

SAN FRANCISCO

HOW FOUR CITIES APPROACH PLANNING FOR DEVELOPMENT

Boston, Dallas, Denver, and San Francisco have all experienced sustained and increasingly substantial commercial development over the last twenty-five years. These trends have accelerated civic concerns about the nature and scope of future development in each city. As a result, city planning and development departments in all four cities have responded, to varying degrees, with plans for accommodating and/or directing growth. Highlights of some of the plans and actions taking place in each city are here reviewed with an eye to similarities and differences.

Similarities and Differences

All of the four cities have been responding to the recent sustained pressures of commercial development. With many studies, plans, and actions prepared and underway, there are some interesting likenesses and contrasts. Common features arise from the similar pressures that the cities are facing while the differences in plans respond to unique features of city size, urban structure, the nature of public regulatory strength, and the detail of implementing actions.

Similarities include:

1. All four cities are indeed preparing downtown plans.
2. All four cities implicitly and explicitly encourage the "24-hour downtown concept" which includes office, retail, hotel, convention, and residential uses.
3. All four cities are attempting to control the pressure of commercial development upon housing.

4. All four cities are specifically concerned with and planning for historic preservation.

5. All four cities are preparing detailed transportation plans for the future.

Differences include:

1. San Francisco and Boston are both preparing stronger public regulatory controls since their laws and traditions are more pervasive while Dallas and Denver have less powerful planning instruments and more reliance on the private sector. Also, Boston and San Francisco are preparing specific guidelines, whereas Dallas' and Denver's plans are more general and conceptual.

2. Zoning codes are more comprehensive in San Francisco and Boston.

3. Boston's and San Francisco's plans are much more detailed concerning urban form and open space.

4. Dallas is more particularly concerned with enhancing the business climate and with the effect of commercial development crowding out industrial development.

5. Denver seems to have the most balanced public-private partnership in the preparation of the plan.

6. Boston's plan seems to have the most comprehensive community participation process through the development review.

7. San Francisco's plan is by far the most detailed--down to individual buildings and blocks. In addition, the plan requires the Planning Department to prepare annual reports monitoring economic growth and the effectiveness of policies to be presented to the Planning Commission, Mayor, and Board of Supervisors.

8. Dallas has a concern with building new infrastructure for more capacity primarily because the city is so large and has emerging growth areas outside of downtown.

9. Boston and Dallas seem to have much more concern for the disparity of development between richer and poorer areas within the city.

10. While Denver and Dallas currently have the highest office vacancy rates, plans are less restrictive and more encouraging of continuing development, whereas Boston and San Francisco are better "markets" but are intending to be more stringent reflecting concern for future development. This most likely has to do with smaller city size, current size of space, the more pervasive historic character of these cities, and community sentiment.

Boston

Boston's draft report, "Downtown Guidelines: Growth Policies for Central Boston, 1985-1995" outlines a plan for the management, coordination, and direction of future growth in downtown Boston. The guidelines are designed to cope with the economic expansion and growth pressures from commercial development which Boston has been experiencing. The concept of "Balanced Growth"--focusing on the match between the benefits of new development and the preservation of economic and environmental quality--is the overall theme. While Boston remains committed to new investment, the growth policies provide for specific public controls on what will be built, where, and what the magnitude of development would be. In addition, the city is establishing mechanisms to narrow the disparity between the prosperous downtown and the poorer neighborhoods by spreading the benefits of growth in terms of jobs and housing for Boston residents. The guidelines (which are preliminary to the formulation of a "Downtown Plan") detail a process of community participation in development. Specifically, the guidelines' elements include:

Public Realm - Urban Form
- Guidelines for height and urban design criteria
- Open space plans
- Historic preservation
- Microclimate and environmental standards

Economic Development
- Targeted economic revitalization districts

- Planned Development Areas (PDAs)
- Transportation planning and management objectives

Economic Justice - Jobs and Housing
- Job training
- Resident hiring
- Minority participation standards
- Diversity of housing production
- Incentives for housing vis-a-vis commercial development
- Downtown residential districts
- Linkage fee on commercial development for housing
- Downtown/Neighborhood "parcel to parcel" linkage

Open Process - Zoning and Community Participation
- Revised zoning codes
- Interim zoning districts
- Planning Advisory Committee (PAC) plan review
- Revised BRA development review procedures
- Development information center
- Revised public hearing and notification procedures
- City/State agency coordinated development review.

Boston's Downtown Guidelines are currently being discussed and reviewed.

Dallas

During the 1980s the city of Dallas has reorganized its planning and development agencies and has prepared several planning documents on the direction and scope of development activity in the city. Traditionally, the private sector is much stronger and in control of development in Texas than is public sector planning. However, the strong and sustained economic development in recent years has brought problems along with the obvious benefits of growth. Four specific problems the planning documents address are: (1) the constraints on the city's ability to service new development activity outside of downtown (particularly the Northern Sector), (2) the increasing competition for development between the suburbs and the city, (3) the continued imbalance of economic growth between the city's prosperous northern and poorer southern halves, and (4) intrusion of commercial development into

residential and industrial areas throughout the city. Dallas has recognized that the local government must become a stronger and more active formal participant in the economic development process. By combining the city's Office of Economic Development with the Department of Planning and Development in 1982, Dallas linked economic development to the comprehensive planning process. A position paper stated that:

> "...There is a direct relationship between economic development planning and physical development planning. Economic development depends on a city's ability to maximize the use of its resources. Physical development planning controls a city's urban development resources (through land use policies and plans, zoning ordinances and regulatory instruments). These two functions should be supportive of each other and goals should be consistent trying to achieve the same objective for each area".

The following is a review of some of the concerns, plans and actions being taken by Dallas regarding development. Dallas has not been as concerned with planning for the downtown as other cities, nor has it prepared detailed and comprehensive land use and urban design guidelines for downtown development.

Economic Objectives and Goals

- Maintaining a healthy business climate
  - promoting the strength and growth of firms
  - encouraging compatibility between economic growth and the existing environment
  - coordinating efforts with other agencies to promote economic development in the metropolitan region
- Expanding, retaining, and attracting new business to the city
  - job creation
  - job training and education
  - promoting minority and small business
- Encouraging balanced economic growth throughout the city
  - improving the utilization of existing resources
  - encouraging appropriate development in under-capitalized areas of the city, especially in the areas of low-income minority concentrations in the southern half.

Planning Policies - 1984

- Transportation policies
  - regional cooperation
  - maximize federal and state assistance

- plan transportation systems with sufficient capacity to support existing land use
- plan for a balanced transportation system of fixed transit, buses, and highways
- use parking supply as a tool to achieve planning objectives
- expand and improve railroad facilities

- Housing and neighborhood policies
  - enforcing minimum code standards
  - encourage affordable housing
  - encourage specialized housing production
  - protect and improve residential neighborhoods
- Development standards policies
  - plan for growth in designated districts
  - open space
  - infrastructure
  - site planning
  - zoning standards
  - mixed use development
  - development review procedures
- Public infrastructure policies
  - optimally allocate public funds for new development and maintenance

Other Plans

CBD Concept Plan - 1980
Revised Zoning Ordinance
Creation of Development Corporation
Economic Analysis and Services
Historic District for "West End"
Oak Lawn Planned Development District
- bonuses for housing versus commercial development

Dallas Parkway Study
- comprehensive land use plan for development of northern Dallas as a mixed use commercial district.

Denver

The City of Denver has generated strategies for planning and development to deal with the expanding amount of commercial building downtown. Until this year Denver's development has been primarily directed by two separate entities: The Denver Partnership--a public-private group concerned with business activity and development, and the Planning Department--a city agency in charge of physical, environmental and land use planning. These groups have begun to work

together more consistently and are currently undertaking a joint venture to prepare a Downtown Plan to be completed by December 1985. Collaboration of these two groups has been desirable because it combines the resources and influence of the Partnership with the practical tools of the Planning Department. A new city Department of Economic Development will be created to provide more comprehensive planning functions, specifically, to plan for a new convention center, airport expansion, transit development, and smaller neighborhood commercial redevelopment. The intent is to make the planning departments and their policy role more effective and encompassing. A range of planning policies and strategies are being prepared for use in guiding future development; they are not as detailed as the San Francisco planning effort.

Downtown Plan
- Establishes an overall framework for downtown planning on the conceptual level
- Provides general scope of acceptable scales and densities for development
- Encourages residential development through Transfer of Development Rights (TDRs) for reuse of older buildings
- Creates a preservation district (Lower Downtown) with specific guidelines and review procedures for historic preservation of older districts
- Continues to encourage new commercial development downtown.

Unified Housing Plan
- Creation of residential "target areas"
- Estimates potential for housing units
- Hypothetical pro formas for conversion of older buildings to residential use.

Review of Zoning Procedures
- Directing development to areas of need
- Urban design and density criteria
- Financial District zoning now appropriate and does not need changes.

Transportation Planning and Infrastructure
- New plan for improved transportation access

- Plans for new public transit
- Schedule for maintenance of infrastructure and improving existing amenities such as open space.

San Francisco

The City of San Francisco has prepared probably the most comprehensive Downtown Plan and corresponding strict zoning regulations and design controls of any city in the nation. San Francisco's plan is in response to a long-simmering debate between "pro-growth" and "slow-growth" advocates who have varying interpretations of whether the city can handle explosive downtown commercial development. The plan builds upon successful attempts and learns from unsuccessful efforts for innovative zoning and design guidelines in New York City over the last twenty years. There are also concerns for historic preservation, open space, stimulus of housing production, transportation strategies, and novel ideas for subsidizing transit project improvements, child care facilities, and art work provision for employees in downtown buildings. The Department of City Planning, historically a strong public agency, will retain and further its dominance of planning regulatory issues. San Francisco's effort is a bold approach to balance the right of the public to a well-planned urban place and the right of private interests to develop land. Although final approval for the "Implementing Actions" elements of the plan are not yet complete and both sides say the results do not go far enough in their particular direction, some rigorous form of the plan will be adopted. Beyond San Francisco, the biggest impact will likely be to further heat up similar debates in other cities. A few highlights of the Downtown Plan follow:

Space for Commerce
- Managing economic growth and change to balance development benefits and minimize undesirable consequences. (A cap on amount of development in designated downtown districts.)
- Encourage business growth downtown through a wide range of commercial activity--office, retail, hotel, convention and support space "as long as undesirable consequences of growth can be controlled."

Space for Housing
- Preserving neighborhood and downtown scale and character through locating new housing adjacent to downtown in underused commercial and industrial areas
- Protect the existing housing supply in and around downtown from conversion to commercial use
- Rezoning for residential use.

Open Space
- Preservation and enhancement of existing open space
- Creation of new open space through public and private efforts
- Pedestrian network connections.

Preserving the Past
- Preservation of Landmarks and other buildings of architectural merit (266) through TDR bonus rights
- Creation of 5 conservation districts.

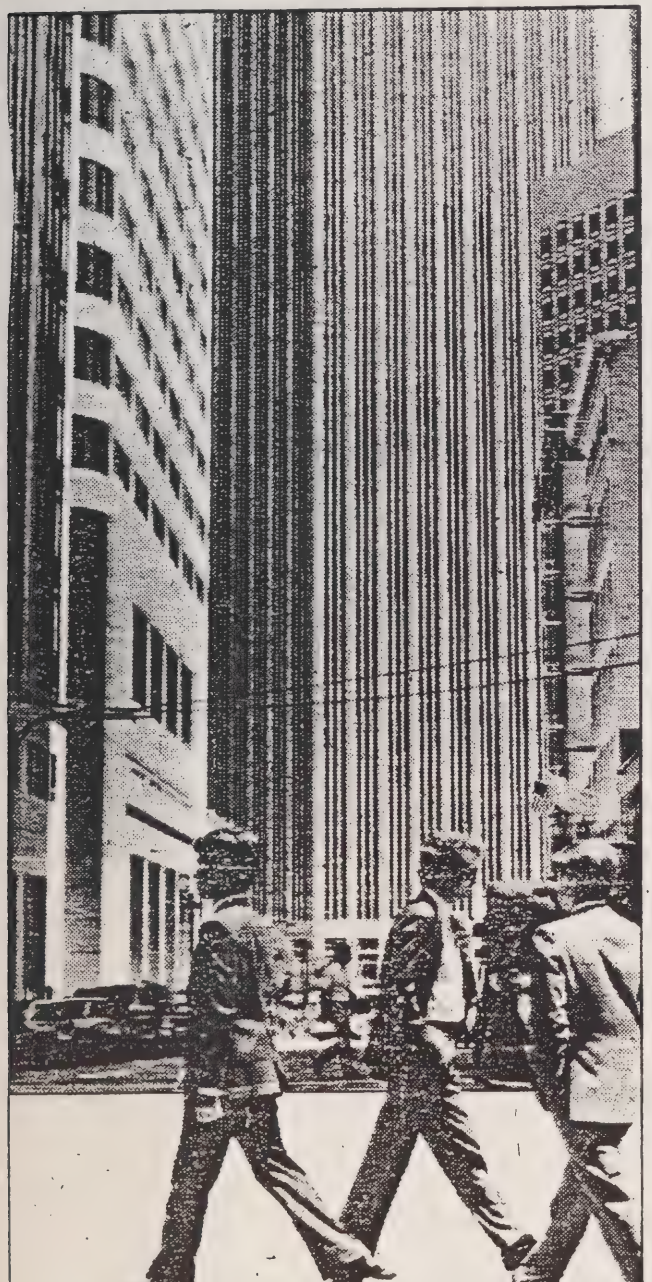
Urban Form
- Detailed guidelines for downtown building height and bulk, building separation, sunlight, wind, building appearance, and street relationship.

Moving About
- Rapid transit development
- Alternative transit
- Parking
- Circulation
- Pedestrian improvements

Seismic Safety Standards and Actions

The Struggle to Keep Skylines in Line

5/4/85



Long shadows in San Francisco's financial district; below, a view of downtown Los Angeles.

The New York Times/Terrence McCarthy (San Francisco), George Brich

By ROBERT LINDSEY

SAN FRANCISCO — While the skyscraper is by no means an endangered species, a growing number of City Halls are being pressured these days to slow or otherwise restrict downtown building booms.

San Francisco's Board of Supervisors last month approved a new zoning law designed to limit the height and size of office towers and to reduce by half the projected employment growth downtown over the next 15 years.

Adoption of the plan came after more than a decade of complaints from San Franciscans that their city was being "Manhattanized." Meanwhile, a citizens group, protesting that the law does not go far enough, has begun gathering signatures on petitions to place before the voters this fall a measure that would impose an immediate moratorium on virtually all skyscraper construction.

Although no other city has so far considered restrictions as stringent as San Francisco's, groups around the country are mounting challenges to downtown development. The groups argue that the unrestricted spread of high-rise towers can rob cities of sunlight and open space, aggravate traffic, parking and housing problems and otherwise reduce the quality of life.

Philadelphia's City Council recently approved construction of two 60-story office structures that will climb 367 feet above the statue of William Penn that sits atop the 550-foot City Hall. The approval came only after an emotional effort to halt the project by citizens who claimed "Billy Penn's nose" was, by long tradition and good sense, the highest that buildings there should rise.

Proposals to limit construction of office towers have also surfaced recently in Boston, Dallas and Los Angeles, among other cities.

In New York, officials have weathered citizen protests over the enormous bulk of projects planned for Times Square and the site of the New York Coliseum. Public concern that the East Side of midtown Manhattan was becoming overloaded with sun-blocking towers has led to efforts by the city to shift future high-density developments to the west. This, in turn, has triggered protests that development, while bolstering tax revenues, could threaten the theater district, the garment center and other traditional West Side hallmarks.

At the turn of the century, Los Angeles enacted a law limiting buildings to 13 stories, a step largely intended to encourage development of an urban environment different from the smokey, high-rise-dominated cities of the East. After the law was repealed in 1957, a forest of glittering new buildings ranging up to 62 stories took root downtown, creating thousands of new office jobs and bringing vitality to the once-decaying sector. But sentiment has surfaced recently that perhaps the time has come to turn back the clock and impose limits.

The booming downtown workforce is causing severe traffic and parking problems. Some want to impose a moratorium on high-rises to avert predicted downtown traffic "gridlock" if more are built. There are esthetic concern well. Some officials want to restor 13-story limit in the old financial dis because of fears that proposed skys ers will dwarf buildings erected the limit was in effect.

Israel Stollman, executive dir of the American Planning Associa said that in many cities there is broad support for construction of ne fice buildings, motivated by a desi stem a loss of jobs to suburban munities and "to maintain vit downtown."

But, he and others say, even in r of these cities there have been inc ingly vocal efforts by residents to tect their communities from being run. "There's more active particip by citizens today," Mr. Stollman "People were passive before; now want a say."

Because of their frequently sub tial contributions to candidates for lic office, real estate and develop interests anxious to build more and ger buildings have considerable sw many cities. For the moment, pla say, local politicians are less likely moved by public opposition to projects than they are by economic siderations, including the current g office space in many American citie

The Inevitable Towers

Some experts say that in most nomically healthy metropolitan ar certain amount of high-rise constru will occur, in one place or anothe gardless of restrictions. In Washin D.C., for example, buildings taller the United States Capitol have long barred. The result has been a surge fice-tower construction in nearby ginia, and with it the congestion often accompanies such high-de developments.

Still, as America shifts increas to a service-oriented economy bas the cities, and as more middle-clas fessionals make their homes t many planners say citizens will con asking for a larger voice in the gr and shape of their communities. say it is unlikely that other cities wi pose restrictions as tough as San cisco's, where a somewhat liberal cal climate and a broad public int in preserving the city's reno charms helped overcome oppos from developers. But these experts pect that some cities will at least spired by San Francisco to tighte zoning.

According to Dean Macris, th Francisco planning director, the approach breaks ground in se ways. Besides limiting the numb new buildings and setting height (ranging from 5 to 43 stories, depe on location), it preserves 251 arc turally important structures fro struction; establishes innovative machinery "to deal with the city very intimate basis," zoning pro "lot by lot," and requires develop subsidize community housing, t projects, art work and child care ties for those who work in the new ings.

"Change is going to occur," Macris said. "We can't halt it, b can manage it."

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Conversation with Mr. Sterling Wheeler, Department of Planning and Development, City of Dallas, August 1985.

Denver

Conversation with Mr. Richard Fleming, President, the Denver Partnership, August 1985.

Conversation with Mr. Thomas Gougeon, Mayor's Office, City of Denver, August 1985.

San Francisco

"Downtown," San Francisco Department of City Planning, (Proposed as adopted by the City Planning Commission as part of the Master Plan), November 29, 1984.

TABLES

Table 1

DEMOGRAPHICS; POPULATION, RACE, ETHNICITY, AGE, HOUSEHOLD COMPOSITION, INCOME;
COMPARATIVE ANALYSIS OF BOSTON, DALLAS, DENVER AND SAN FRANCISCO

	Boston	Dallas	Denver	San Francisco
Land Area (square miles)	47.2	330.0	110.6	46.4
Population (1980)	562,994	904,078	492,365	678,914
Percent Change 1970-1980	-12.2	7.1	-4.3	-5.1
Population per Square Mile	11,928	2,715	4,452	14,633
Race (percent of total)				
White	70.5	61.8	76.3	59.2
Black	22.5	29.3	12.0	12.7
Asian & Pacific Islander	2.9	1.0	1.8	22.0
Spanish Origin	6.5	12.2	18.7	12.4
Age (percent)				
Under 5 Years	5.3	7.4	6.7	4.6
5 to 17 Years	16.3	19.5	15.8	12.5
18 to 64 Years	65.7	63.6	64.9	67.5
65 Years and Over	12.7	9.5	12.6	15.4
Median Age (years)	28.9	28.7	30.3	34.1
Persons Born in State Where Now Residing (percent)	58.0	65.6	42.2	36.7
Households	218,457	355,073	211,566	298,956
Persons per Household	2.40	2.51	2.27	2.19
Family Households (percent)	53.3	62.9	55.7	47.0
Nonfamily Households (percent)	46.7	37.1	44.3	53.0
Median Household Income ($)	12,530	16,227	15,506	15,866
Percent of Persons Below Poverty Level	20.2	14.2	13.7	13.7
Population (July 1984)	570,719*	974,234	504,588	712,753
Percent Change 1980-1984	1.2	7.8	2.5	5.0

* Boston's estimated mid-1985 population is 604,000, a 7.3 percent increase from March 1980.

Table 2

HOUSING, JOBS-POPULATION RATIO, EDUCATION;
COMPARATIVE ANALYSIS OF BOSTON, DALLAS, DENVER AND SAN FRANCISCO

	Boston	Dallas	Denver	San Francisco
Housing, 1980				
Total Units	241,444	390,426	227,879	316,608
Percent Change 1970-80	3.9	28.7	17.6	2.0
Vacant Units (percent)	9.5	9.0	7.1	5.5
Units in Structure, Percent with:				
One Unit	15.6	53.5	54.4	34.9
5 or More Units	42.8	37.6	36.6	43.0
Year Structure Built				
Percent Built:				
1970 to March 1980	7.2	28.1	19.7	6.6
1960 to 1969	9.0	26.5	16.8	9.3
1939 or Earlier	63.0	9.8	29.4	51.7
Renter-Occupied Units				
Percent of Total Occupied Units	72.8	51.4	49.8	66.3
Employment/Residents Ratio	1.9	1.5	1.6	1.6
Persons Working Outside City of Residence (Percent)	25.2	17.6	25.1	14.4
School Enrollment--Total	173,439	231,222	114,505	158,916
Elementary and High School--Percent Private	27.7	12.3	16.1	29.8
Persons 25 Years and Over, Percent with 12 or More Years of	68.4	68.5	74.7	74.0

Table 3

UNEMPLOYMENT RATES*, APRIL 1985;
COMPARATIVE ANALYSIS OF BOSTON, DALLAS, DENVER AND SAN FRANCISCO

	Boston	Dallas	Denver	San Francisco
Labor Force	289,023	595,880	296,163	394,107
Unemployed	12,428	27,000	14,512	22,070
Percent Unemployed	4.3	4.5	4.9	5.6

* Rates are not seasonally adjusted.

Source: U.S. Department of Labor, Bureau of Labor Statistics, Federal-State Cooperative Program.

UNEMPLOYMENT RATES FOR METROPOLITAN AREAS

	Boston	Dallas	Denver	San Francisco
Annual Average				
1983	6.9	4.9	5.6	6.5
1984	4.8	3.6	4.7	5.3
April 1985*	3.2	3.9	4.8	4.6
April 1984*	4.3	3.8	4.8	5.3

* Monthly rates are not seasonally adjusted.

Source: U.S. Department of Labor, Bureau of Labor Statistics.

Table 4A

EMPLOYMENT BY INDUSTRY

BOSTON METROPOLITAN AREA, 1970-1984
(Thousands of Employees)

	1970	1976	1980	1984
Total, All Sectors	1,285.0	1,269.3	1,474.1	1,621.5
Construction	58.2	36.9	43.0	51.5
Manufacturing	292.9	257.0	294.9	326.9
Transportation, Public Utilities	76.9	68.1	73.1	75.4
Wholesale and Retail Trade	300.9	292.1	320.0	361.4
Finance, Insurance, Real Estate	93.8	94.3	109.4	122.4
Services and Mining	273.0	326.5	420.1	493.8
Government	189.3	194.4	213.6	190.1

DALLAS-FORT WORTH METROPOLITAN AREA, 1970-1984
(Thousands of Employees)

	1970	1976	1980	1984
Total, All Sectors	938.3	1,131.2	1,454.2	1,681.4
Mining, Agriculture Services	9.3	12.9	25.1	27.9
Construction	51.3	49.6	83.6	105.6
Manufacturing	274.4	251.3	320.3	328.7
Transportation, Public Utilities	68.5	75.4	93.7	99.2
Wholesale and Retail Trade	237.3	307.0	385.1	452.1
Finance, Insurance, Real Estate	67.7	83.2	109.3	138.8
Services	144.5	197.5	256.4	343.0
Government	112.3	154.3	180.7	185.8

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment, Hours and Earnings, States and Areas, 1939-1982, January 1984; Employment and Earnings, May 1982, May 1985.

Table 4B

EMPLOYMENT BY INDUSTRY

DENVER-BOULDER METROPOLITAN AREA, 1970-1984
(Thousands of Employees)

	1970	1976	1980	1984
Total, All Sectors	485.5	631.5	799.3	899.1
Mining, Agricultural Services	6.4	10.7	20.1	24.4
Construction	29.0	33.7	46.2	54.4
Manufacturing	89.4	99.1	124.3	132.4
Transportation, Public Utilities	34.5	40.8	55.5	63.3
Wholesale and Retail Trade	116.9	158.7	192.4	218.1
Finance, Insurance, Real Estate	28.7	41.2	54.0	66.8
Services	89.6	128.1	168.6	203.5
Government	91.1	119.3	138.2	136.2

SAN FRANCISCO-OAKLAND METROPOLITAN AREA, 1970-1984
(Thousands of Employees)

	1970	1976	1980	1984
Total, All Sectors	1,254.7	1,362.6	1,562.6	1,637.4
Mining, Agricultural Services	1.9	2.2	3.4	4.4
Construction	61.9	58.6	75.1	70.9
Manufacturing	201.5	186.6	202.3	189.5
Transportation, Public Utilities	133.2	119.8	130.0	130.9
Wholesale and Retail Trade	265.5	307.3	360.2	387.1
Finance, Insurance, Real Estate	96.7	116.2	146.3	155.1
Services	222.5	282.9	354.1	414.8
Government	271.5	288.9	291.1	284.7

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment, Hours and Earnings, States and Areas, 1939-1982, January 1984; Employment and Earnings, May 1982, May 1985.

Table 5A

EMPLOYMENT BY INDUSTRY

BOSTON METROPOLITAN AREA, 1970-1984
(Percent Change)

	1970-76	1976-80	1980-84
Total, All Sectors	- 1.2	16.1	10.0
Construction	-36.6	16.5	19.8
Manufacturing	-12.3	14.7	10.9
Transportation, Public Utilities	-11.4	7.3	3.1
Wholesale and Retail Trade	- 2.9	9.6	12.9
Finance, Insurance, Real Estate	0.5	16.0	11.9
Services and Mining	19.6	28.7	17.5
Government	2.7	9.9	-11.0

DALLAS-FORT WORTH METROPOLITAN AREA, 1970-1984
(Percent Change)

	1970-76	1976-80	1980-84
Total, All Sectors	20.6	28.6	15.6
Mining, Agricultural Services	38.7	94.6	11.2
Construction	- 3.3	68.5	26.3
Manufacturing	1.6	27.5	2.6
Transportation, Public Utilities	10.0	24.3	5.9
Wholesale and Retail Trade	29.4	25.4	17.4
Finance, Insurance, Real Estate	22.9	31.4	27.0
Services	36.7	29.8	33.8
Government	37.4	17.1	2.8

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment, Hours and Earnings, States and Areas, 1939-1982, January 1984; Employment and Earnings, May 1982, May 1985.

Table 5B

EMPLOYMENT BY INDUSTRY

DENVER-BOULDER METROPOLITAN AREA, 1970-1984
(Percent Change)

	1970-76	1976-80	1980-84
Total, All Sectors	30.0	26.6	12.5
Mining, Agricultural Services	67.2	87.9	21.4
Construction	16.2	37.1	17.7
Manufacturing	10.9	25.4	6.5
Transportation, Public Utilities	18.3	36.0	14.1
Wholesale and Retail Trade	35.8	21.2	13.4
Finance, Insurance, Real Estate	43.6	31.1	23.7
Services	43.0	31.6	20.7
Government	31.0	15.8	- 1.4

SAN FRANCISCO-OAKLAND METROPOLITAN AREA, 1970-1984
(Percent Change)

	1970-76	1976-80	1980-84
Total, All Sectors	8.6	14.7	4.8
Mining, Agricultural Services	15.8	54.5	29.4
Construction	- 5.3	28.2	- 5.6
Manufacturing	- 7.4	8.4	- 6.3
Transportation, Public Utilities	-10.0	8.5	0.7
Wholesale and Retail Trade	15.7	17.2	7.5
Finance, Insurance, Real Estate	20.2	25.9	6.0
Services	27.1	25.1	17.1
Government	6.4	0.8	- 2.2

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment, Hours and Earnings, States and Areas, 1939-1982, January 1984; Employment and Earnings, May 1982, May 1985.

Table 6A

EMPLOYMENT BY INDUSTRY

BOSTON METROPOLITAN AREA, 1970-1984
(Percent Composition)

	1970	1976	1980	1984
Total, All Sectors	100.0	100.0	100.0	100.0
Construction	4.5	2.9	2.9	3.2
Manufacturing	22.8	20.3	20.0	20.2
Transportation, Public Utilities	6.0	5.4	5.0	4.7
Wholesale and Retail Trade	23.4	23.0	21.7	22.3
Finance, Insurance, Real Estate	7.3	7.4	7.4	7.5
Services and Mining	21.3	25.7	28.5	30.4
Government	14.7	15.3	14.5	11.7

DALLAS-FORT WORTH METROPOLITAN AREA, 1970-1984
(Percent Composition)

	1970	1976	1980	1984
Total, All Sectors	100.0	100.0	100.0	100.0
Mining, Agriculture Services	1.0	1.1	1.7	1.7
Construction	5.4	4.4	5.8	6.2
Manufacturing	26.4	22.2	22.0	19.6
Transportation, Public Utilities	7.3	6.7	6.5	5.9
Wholesale and Retail Trade	25.3	27.1	26.5	26.9
Finance, Insurance, Real Estate	7.2	7.4	7.5	8.2
Services	15.4	17.5	17.6	20.4
Government	12.0	13.6	12.4	11.1

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment, Hours and Earnings, States and Areas, 1939-1982, January 1984; Employment and Earnings, May 1982, May 1985.

Table 6B

EMPLOYMENT BY INDUSTRY

DENVER-BOULDER METROPOLITAN AREA, 1970-1984
(Percent Composition)

	1970	1976	1980	1984
Total, All Sectors	100.0	100.0	100.0	100.0
Mining, Agricultural Services	1.3	1.7	2.5	2.7
Construction	6.0	5.3	5.8	6.1
Manufacturing	18.4	15.7	15.5	14.7
Transportation, Public Utilities	7.1	6.5	6.9	7.0
Wholesale and Retail Trade	24.1	25.1	24.1	24.3
Finance, Insurance, Real Estate	5.9	6.5	6.8	7.4
Services	18.4	20.3	21.1	22.6
Government	18.8	18.9	17.3	15.2

SAN FRANCISCO-OAKLAND METROPOLITAN AREA, 1970-1984
(Percent Composition)

	1970	1976	1980	1984
Total, All Sectors	100.0	100.0	100.0	100.0
Mining, Agricultural Services	0.2	0.2	0.2	0.3
Construction	4.9	4.3	4.8	4.3
Manufacturing	16.5	13.7	13.0	11.6
Transportation, Public Utilities	10.6	8.8	8.3	8.0
Wholesale and Retail Trade	21.2	22.6	23.1	23.6
Finance, Insurance, Real Estate	7.7	8.5	9.4	9.5
Services	17.7	20.7	22.6	25.3
Government	21.6	21.2	18.6	17.4

Source: U.S. Department of Labor, Bureau of Labor Statistics, Employment, Hours and Earnings, States and Areas, 1939-1982, January 1984; Employment and Earnings, May 1982, May 1985.

Table 7

OFFICE CONSTRUCTION DOWNTOWN, 1950-84

COMPARATIVE ANALYSIS OF BOSTON, DALLAS, DENVER AND SAN FRANCISCO

Millions of Square Feet	Boston	Dallas	Denver	San Francisco	Total	33 Downtowns Total
1950-84	22.8	25.7	21.0	32.0	101.5	683.4
Rank	8	6	9	5		
(New York 1; Chicago 2; Washington, D.C. 3; Houston 4; Los Angeles 7; Philadelphia 10)						
1950-59	0.3	4.0	1.1	1.0	6.4	57.7
1960-69	4.0	3.3	1.2	8.2	16.7	131.7
1970-79	12.3	3.9	5.8	12.4	43.4	196.3
1980-84	6.2	14.4	12.8	10.5	43.9	217.8
Number of Downtown Buildings						
1950-84	48	47	62	85	242	1,556
1950-59	1	15	5	6	27	231
1960-69	13	7	8	22	50	431
1970-79	19	6	17	23	65	415
1980-84	15	19	32	34	100	479
Rank	8	10	5	4		
Average Size of Buildings (Thousands of Sq. Ft.)						
1950-84	475	546	339	377		388
1950-59	285	267	226	169		250
1960-69	310	468	154	371		305
1970-79	648	657	339	541		473
1980-84	411	760	402	307		455
Buildings of 1+ Million Sq. Ft.						
1950-84	9	9	3	6		121
1950-59	0	0	0	0		4
1960-69	1	0	0	2		18
1970-79	6	2	0	3		49
1980-84	2	7	3	1		50
(New York 45; Houston 13; Chicago 12)						

Source: Urban Investment and Development Corp., Downtown Construction in Major U.S. Cities, 1984. The Office Network, 1985.

COMPARISON OF OFFICE CONSTRUCTION PER CAPITA FOR 20 LARGEST U.S. CITIES, 1984

20 Largest Cities	Square Foot Per Capita		Mid-1984+ Office Construction Underway		1984 Population	
	Rank	Number	Rank	Number of Sq.Ft.	Rank	Number
18 Cities*						
Boston	1	7.66	4	4,376,000	19	570,719
Dallas	2	5.35	2	5,208,000	7	974,234
San Francisco	3	4.71	6	3,354,000	12	712,753
New Orleans	4	4.15	8	2,323,000	21	559,101
New York	5	2.32	1	16,611,000	1	7,164,742
Washington, D.C.	6	2.21	10	1,375,000	16	622,823
Houston	7	1.83	7	3,126,000	4	1,705,697
Baltimore	8	1.61	11	1,229,000	11	763,570
Columbus, Ohio	9	1.59	12	900,000	20	566,114
Chicago	10	1.56	3	4,655,000	3	2,992,472
Milwaukee	11	1.26	14	785,000	18	620,811
Philadelphia	12	1.23	9	2,025,000	5	1,646,713
Indianapolis	13	1.22	13	863,000	13	710,280
Los Angeles	14	1.13	5	3,497,000	2	3,096,721
San Diego	15	.49	15	468,000	8	960,452
San Antonio	16	.35	16	296,000	10	842,779
Phoenix	17	.09	17	77,000	9	853,266
Detroit	18	0	18	0	6	1,088,973
2 Cities**						
San Jose	(1-2)	(7.29)	(2-3)	(5,000,000+)	14	686,178
Memphis	(7-8)	(1.66)	(11-12)	(1,078,000)	15	648,399
18 Cities	x	1.93	x	51,168,000	x	26,452,220
20 Cities	x	2.06	x	57,246,000	x	27,786,797

+ Mid-1984 office construction includes only new buildings to be completed from mid-1984 through year end 1985 or mid-1986.

* For 18 cities, office construction data obtained from U.I.D.C. report of construction underway as of mid-1984.

** For 2 cities, office construction data obtained from Cushman and Wakefield for buildings under construction January 1985. Since data may not be consistent, cities were separated.

Sources: Compiled by BRA Research Department, July 1985, from U.I.D.C., Downtown Office Construction in Major U.S. Cities, October 1984 and Cushman and Wakefield, Market Trend: National Office Space, January 1985. Population from U.S. Census Bureau, 1984 estimates.

Table 9

OFFICE DEVELOPMENT;
COMPARATIVE ANALYSIS OF BOSTON, DALLAS, DENVER AND SAN FRANCISCO

	Boston	Dallas	Denver	San Francisco	33 Downtowns Total
Average Annual Absorption of Downtown Space (Sq. Ft.)					
1970-79	1,231,000	394,400	577,000	1,244,500	594,782
1980-84	756,667	2,322,222	1,936,000	1,887,111	977,495
1970-84	1,083,793	992,690	998,759	1,363,241	706,031
Rank	6	8	7	4	
(New York 1; Chicago 2; Houston 3; Washington D.C. 4)					
Unleased Space (Sq. Ft.)	2,765,000	3,994,000	4,139,000	3,106,000	
Years of Supply	2.6	4.0	4.1	2.3	
Rank	12	22	24	9	
Office Market Spring 1985					
Downtown Vacancy Rate	11.2%	15.4%	20.0%	8.9%	
Metro Ring Vacancy Rate	7.3%	20.1%	20.8%	NA	
All Metro Vacancy Rate	8.9%	18.7%	20.5%	8.9%	
Downtown Office Construction, Percent Preleased	19.7%	33.0%	66.5%	9.8%	
Rental Rates-Class A					
Existing Buildings Average					
Downtown	$33.83	20.84	22.00	32.00	
Outside Downtown	16.76	17.95	20.00	NA	
Buildings under Construction					
Downtown	$36.16	30.00	29.00	39.00	
Outside Downtown	22.80	20.75	22.00	NA	

Source: Urban Investment and Development Corp., Downtown Construction in Major U.S. Cities, 1984.

The Office Network, 1985.

Table 10

TALL BUILDINGS, NINE U.S. CITIES

Atlanta:	Western Peachtree Plaza	723 Ft.	71 Stories		
		700+	1 Building		
		600-700	2 Buildings	5 Buildings	500+
		500-600	2 Buildings		
Boston:	John Hancock Tower	790 Ft.	60 Stories		
		700 +	2 Buildings		
		600-700	2 Buildings	12 Buildings	500+
		500-600	8 Buildings		
Chicago:	Sears Tower	1,454 Ft.	110 Stories		
		1,000+	3 Buildings		
		800-1,000	2 Buildings		
		700-800	4 Buildings	32 Buildings	500+
		600-700	6 Buildings		
		500-600	17 Buildings		
Denver:	Republic Plaza	714 Ft.	56 Stories		
		700+	2 Buildings		
		600-700	1 Building	6 Buildings	500+
		500-600	3 Buildings		
Houston:	Texas Commerce Tower	1,002 Ft.	75 Stories		
		1,000+	1 Building		
		800-1,000	2 Buildings		
		700-800	5 Buildings	26 Buildings	500+
		600-700	7 Buildings		
		500-600	11 Buildings		

Los Angeles:	First Interstate Bank	858 Ft.	62 Stories		
		800+	1 Building		
		700-800	2 Buildings		
		600-700	4 Buildings	10 Buildings	500+
		500-600	3 Buildings		
New Orleans:	One Shell Plaza	697 Ft.	51 Stories		
		600+	1 Building		
		500-600	1 Building	2 Buildings	500+
New York:	World Trade Center (2)	1,350 Ft.	110 Stories		
		1,000+	4 Buildings		
		900-1,000	3 Buildings		
		800-900	3 Buildings	107 Buildings	1500+
		700-800	9 Buildings		
		600-700	33 Buildings		
		500-600	55 Buildings		
San Francisco:	Transamerica Pyramid	853 Ft.	48 Stories		
		800+	1 Building		
		700-800	1 Building		
		600-700	2 Buildings	15 Buildings	500+
		500-600	11 Buildings		
Dallas:	Main Centre	939 Ft.	73 Stories		
		700+	1 Building		
		600-700	5 Buildings	15 Buildings	500+
		500-600	9 Buildings		

Source: The World Almanac, Newspaper Enterprise Association, Inc., New York, 1985.

Note: Includes office, residential, hotel, government and all other building types. Data include buildings through December 1984 only.

Table 11

CONVENTION SITE FACTORS;
COMPARATIVE ANALYSIS OF BOSTON, DALLAS, DENVER AND SAN FRANCISCO

	Boston	Dallas	Denver	San Francisco
Convention City				
Size Rank				
Metro Area				
Population (millions)	3.7	3.1	1.7	3.3
Rank	6	8	18	7
	(New York 9.0 (1); Los Angeles 7.6 (2))			
Population within 400 Mile				
Radius (millions)	56.8	24.3	8.8	23.1
Rank	10	16	27	16
	(Cleveland 92.1 (1); Washington, D.C. 85.1 (2))			
Citywide Hotel Rooms (1982)				
Rooms	16,200	30,000	12,500	24,000
Rank	13	6	20	9
Within Walking Distance	5,000	1,030	2,217	5,200
Rank	6	19	13	5
Number of Direct National				
Airline Flights	105	114	126	105
Rank	9	8	6	9
Cumulative Total				
5 Rankings	44	56	84	46
Rank	5	8	19	6

Source: Howard, Needles, Tammen & Bergendorf, "Market Analysis....for Proposed Hynes....Expansion."
Sales and Marketing Management, "1982 Survey of Buying Power."
North American Flight Guide.
Laventhol & Horwath.

Table 12

COMPARATIVE HOTEL MARKET STATISTICS, 1983-1984
OCCUPANCY RATES (%) AND AVERAGE RENTAL RATES ($)

	Boston	Dallas	Denver	San Francisco	U.S.A.
Occupancy					
1984	70.4%	64.1%	64.1%*	76.2%	65.9%
1983	67.4%	59.6%	NA	73.4%	65.2%
Percent Change	+ 4.5%	+ 7.6%	NA	+ 3.8%	+ 1.1%
Room Rate					
1984	$75.91	$52.19	$53.26*	$61.11	$56.22
1983	$73.13	$46.87	NA	$58.50	$51.90
Percent Change	+ 3.8%	+ 11.4%	NA	+ 4.5%	+ 8.3%

* Note: Denver data are for March 1985 since trends were not recorded prior to 1985.

Source: Laventhol & Horwath, 1985.

Table 13

CONVENTION FACILITIES;
COMPARATIVE ANALYSIS OF BOSTON, DALLAS, DENVER AND SAN FRANCISCO
(Gross Sq. Ft.)

	Boston	Dallas	Denver	San Francisco
Exhibit Space				
Prime Facility	150,000	610,000	100,800	271,000
1985		650,000		
1989	233,100			
Largest Single Hall	100,000	250,000	100,800	272,000
1985		650,000		
1989	130,400			
Meeting Space				
Prime Facility	12,000	50,000	26,500	25,000
1985		187,000		
1989	78,000			
Hotel Rooms				
Walking Distance	5,000	1,030	2,217	5,200
National Convention and Trade Show Events (1983)	92	171	107	201
Rank	13	6	10	4
	(Washington, D.C. 324 (1); Chicago 317 (2); New York 315 (3))			
National Convention and Trade Show Delegates	114,823	301,215	85,295	262,260
Rank	15	4	18	7
	(New York 514,826 (1); Chicago 411,719 (2); Washington D.C. 401,360 (3))			
Total, International, National, Regional, and State Conventions, and Trade Show Events	125	283	140	261
Rank	15	4	13	6
	(Chicago 385 (1); New York 361 (2); Washington, D.C. 334 (3))			
Total Delegates	221,383	467,760	127,605	360,935
Rank	14	3	19	6
	(New York 620,646 (1); Chicago 539,499 (2); Dallas 467,760 (3))			

Source: Laventhol & Horwath, "Successful Meetings, 1983.".

Table 14

CITY GOVERNMENT REVENUE AND EXPENDITURES;
COMPARATIVE ANALYSIS OF BOSTON, DALLAS, DENVER AND SAN FRANCISCO

	Boston	Dallas	Denver	San Francisco
City Government Finances, 1981*				
General Revenue, Total ($ millions)	984.1	406.7	430.3	1,225.4
Intergovernmental ($ millions)	361.6	61.6	144.5	511.8
Taxes, Total ($ millions)	495.8	235.4	104.8	374.4
Property, Percent of All Taxes	98.8	55.0	64.8	48.4
Property Tax Per Capita (Dollars)	870	143	138	267
Percent from Sales and Gross Receipts	0.0	43.0	16.3	29.8
General Expenditures, Total ($ millions)*	874.8	452.8	454.1	950.7
Per Capita (dollars)	1,554	501	922	1,400
Percent of Total for:*				
Education	31.1	0.0	0.0	1.9
Highways	2.2	11.8	6.1	1.0
Health & Hospitals	10.4	1.6	17.4	14.5
Police Protection	8.1	14.5	9.7	7.5
Sanitation & Sewerage	3.9	15.1	7.1	11.6
Percent Change in Constant Dollar** Expenditures 1975-1982	-33.2	+27.4	-10.6	+10.3
City Government Employees, 1982	18,677	13,959	11,431	20,786
Percent Change 1975-1982	-25.0	+4.8	-6.7	-3.6

* Dallas, Denver and San Francisco have separate school districts that are fiscally independent from the city.

** Inflation is factored out of the expenditure figures, using the U.S. Gross National Product Implicit Price Deflator.